## Contract Registration for Vendors

**Roles Involved:**
- Vendor Admin
- Vendor Contract Signatory
- Vendor Financials L1 & L2

**Summary:**
Step-by-step instructions for contract registration activities in PASSPort.

Last Updated: July 2020
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About PASSPort

PASSPort, the City of New York’s Procurement and Sourcing Solutions Portal, facilitates an end-to-end digital procurement process that is transparent and easy to access. Designed with and for vendors and City agencies, PASSPort leverages technology to address long-standing procurement issues, establish a more timely procurement process and make it easier to do business with the City of New York. PASSPort allows for online solicitations, awards and contract execution, registration and management.

Accessing PASSPort

Adjusting Font Size.  While navigating PASSPort, you are able to easily increase its font size and readability. To do this, hold “ctrl” (or, on a Mac, “command”) and press the “+” key on your keyboard. Each time you click the “+” key, your web browser will zoom in and PASSPort will resize accordingly. To reduce PASSPort’s font size, hold “ctrl” (or, on a Mac, “command”) and press the “-” key.

Tool Tips.  There are tool tips available throughout PASSPort that provide quick and helpful information relevant to specific fields. Tool tips can be accessed by hovering over the Information icon.

Required Fields.  Some information fields are required in PASSPort. These are indicated by a red marker. A user will not be able to move past a PASSPort screen without completing required fields.
1. Introduction

The Contract Registration for Vendors User Manual provides an overview of the contract registration process in PASSPort. After a vendor is selected for an award, they will enter into the contracting process in PASSPort. Vendors will have access to the contract record upon contract initiation but will be unable to complete any activities until the agency sends a task to the vendor. The first task the vendor will receive is to upload any requested documents. The vendor will complete this in the Documents Tab. The vendor will also identify a site in Sites Tab and complete the Doing Business Data Form in the LL34 section as part of this initial task.

When the contract document is ready, agencies have the option to share the Contract document prior to it being sent to the Law Department for approval. Vendors will be able to review, make changes and approve the document. Agencies have the option to send the Contract document directly to the Law Department for approval. In both instances, after the Law Department approves the Contract, agencies will send vendors the contract for a vendor final review. Vendors will receive a notification that the Authoring Document is ready to be reviewed in PASSPort. Upon the completion of the review of the Authoring Document, the final step is for the vendor to sign the Contract Agreement electronically in-system through DocuSign. Vendors will start this process by selecting a Vendor Contract Signatory to prepare the Authoring document for their signature. When the agency has initiated the Electronic Signature process, the identified Vendor Contact Signatory will be able to access the document and provide their signature within DocuSign. Once the document is signed by both parties, the Vendor will receive a notification that will include a copy of the signed document attached.

Once the contract package is complete in PASSPort, and all necessary actions are fulfilled by both the City and vendor, the contract package will be sent to the Comptroller for registration.
1. Award Selection Status

Submitted responses will be reviewed, and vendors selected for award based on criteria specified in the RFx. Awarded vendors will work with the contracting agency to complete actions directly in PASSPort, streamlining the contracting process. This first section will walk through the award selection notification process. The following sections will outline each subsequent step required to complete the contracting process in PASSPort.

1. From any page in PASSPort, click the “RFx” menu option at the top of the page.

2. To view RFx responses submitted by your organization, select “Browse Your RFx and Responses” from the drop-down menu.
You can filter your responses to see which RFx have received selection updates.

3. Select “Selections Made” from the RFx Status drop-down. This will display all RFx to which your organization has submitted a response and where an agency has made their award selections.

4. Click the pencil icon to open an RFx response and view more details about the RFx, including whether or not your organization has been selected for award.
5. To view your organization’s selection status, click the “Manage Responses” tab on the left-hand navigation bar.

*Note: The Submission Status will appear in green as “Submitted.”*

6. If the agency has selected your response for award, your Selection Status will be “Selected.”

A status of “Not Selected” indicates the agency did not select your response for award.
Agencies can also choose to notify you of your award selection directly in PASSPort, as part of their award selection process. In this instance, PASSPort will send an email notification advising you of your award selection status.

Within the email notification, click on the hyperlinked RFx title will take you to the specific RFx in PASSPort.
3. Managing My Contracts Overview: Contract Registration

Once selected for award, a vendor will complete all of the necessary actions required for the contract to be registered. This section will walk through how to view a contract in PASSPort, and all corresponding high-level contracting information.

The below step-by-step process workflow provides an overview of all of the steps involved in the standard contracting process in PASSPort.

1. From any page in PASSPort homepage, click the “Contracts” at the top of the page.

2. Select the “Manage My Contracts” option from the drop-down menu.
Upon clicking **Manage My Contracts**, a list of your organization’s contracts available in PASSPort will be displayed.

**Note:** All RFx responses submitted and selected for award in PASSPort will be processed in PASSPort.

3. Click the **pencil icon** to open and view a contract.
The **Header** tab information will display with key details related to the contract.

1. The **Alerts** tile shows pending completion tasks for contract registration and provides messages to help guide you through the process.

2. The **Contract Header** tile displays key contract information, including contract Status, Source, Procurement Method, Title, Vendor, Contracting Agency, E-PIN and more.

3. The **Contract Description** tile contains a written description of the contract provided by the Agency.
4. The M/WBE Goals tile includes a table where participation goals for the procurement will be displayed. Note: this section will only appear if this procurement is participating in the M/WBE program.
Additional contract details can be found in the Overview tab.

1. At the top of the Overview screen is a section that displays high-level contract information, including the Contract title, Contract ID, E-PIN, Vendor, FMS Contract Type, Source, Contracting Agency and the current Status for the Contract. This section also includes the contract Amount, Start and End Date.

2. The Vendor Team section lists all of the members of your organization that have been added to this Contract team.

3. The Internal Agency Team tile displays the key agency contacts for the contract, their core function and their email address.
4. The **Award Milestones** tile provides an updated account of your contract’s progress on the path toward registration and tracks the completion status of key contracting milestones.

### Key:

- **Green check marks** indicate **completed** milestones.
- **Yellow clocks** indicate milestones **in progress**.
- **Gray circles** indicate milestones that have **not yet been started** for a particular contract.

<table>
<thead>
<tr>
<th>Status</th>
<th>Detail</th>
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<tbody>
<tr>
<td>Award Creation</td>
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<tr>
<td>Agency Award Documentation</td>
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<tr>
<td>ACCO Approval Award Documentation</td>
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<tr>
<td>Vendor Documents Request</td>
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<td>Vendor Documentation Submission</td>
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<td>EO 102 Review</td>
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<td>Responsibility Determination</td>
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<td>Vendor Filing Status</td>
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<td>Agency Draft Financial Allocations</td>
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<td>Agency Certification of Funds</td>
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<td>Agency Contract Drafting</td>
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<td>Vendor Contract Review</td>
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<tr>
<td>LAW Department Contract Review</td>
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<tr>
<td>Contract Signature</td>
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<tr>
<td>Public Hearing Request Submission</td>
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</table>
3.1 Setup Team Tab

The Setup Team tab is where you will be able to develop and manage the team dedicated to this contract’s activities. A Vendor Adding Contacts and Assigning Roles Job Aid has been created to provide you with information on user roles within the system to help you build your team. Please click here to view this Job Aid.

1. Click on the “Setup Team” tab on the left-hand menu.

2. The Setup Team table shows the agency contact(s) with whom you can communicate with directly in-system about this contract.

3. The Vendor Contact Signatory section. This section lists the team members from your organization authorized in PASSPort to sign the contract on behalf of your organization.

4. The Vendor Team section provides all Contacts from your organization who will be working on the contract, and their designated user role Profile in connection with the contract. This section also provides additional information, including Email and Status, for those contacts.
To add additional contact(s) to the Contract Vendor Team:

1. Click the “Add Contact” button.
Upon clicking “Add Contact,” a **Add Contact** window will appear.

6. Enter the name of the team member you would like to add in the Keywords field and click “Search.”

7. Select the checkbox next to the name(s) of team members you want to add.

8. Click the “Close” button. The new user(s) will now be a part of the Contract vendor team.
3.2 Sites Tab

The Sites tab includes information on the location of the contract project. You may include multiple locations if the project is being implemented at multiple sites. Entering site information is one of the first tasks vendors will need to complete (uploading required documents and updating LL34 information will be covered in the following sections.)

Vendors can add a site(s) to identify where they will be performing work for this contract.

1. To add a site, click the “Add Address” button.
2. In the appearing pop-up, complete the address information by filling out required fields, as indicated by red highlight.

Note: You may add an Address Label to help identify the address in system.

3. Click the “Save and Close” button.
3.3 Documents Tab Overview

The Documents tab contains three sections: Authoring Documents, Vendor Documents, Sourcing Project Documents and Contract Documents. Each section facilitates critical activities in the contract development process. The Authoring Documents will be where the contract agreement will be available for your review. The Vendor Documents section is where the agency will outline which documents are necessary for you to submit for this contract. Common examples include certifications and licenses relevant to the work you will perform for this contract. You can upload these requested documents into this section. The Sourcing Project Documents section retains documents shared by the agency as part of the Sourcing Project. Any additional contract documents shared by the agency will be available in the Contract Documents section.
3.4 Vendor Document Upload

The first task the vendor will receive from the agency is a request to upload documents the agency needs for the Contract. After the vendor uploads the documents, the vendor will see their documents within the Vendor Documents section.

The Requested Document type section is where vendors will see which documents the agency has requested. In this example, two documents are requested: Board of Director List and Licenses.

1. To upload, click “Add Documents.”
2. A listing of pre-loaded document types appears on the screen. Find and click to select the title of the relevant document that will be uploaded.
Upon selecting a document type, a window will appear for you to complete related to the document selected.

3. Fill out the required fields.

4. Upload the document.

5. Click “Save and Close.”

*Note: documents must be Word, Excel, or PDF to upload.*
After the documents have been uploaded successfully, they will appear in the Vendor documents tile. Details about the document including the Document Name, Document Type, Begin Date, Status & Last Modified are displayed in the table. There is also an option to download the document.
3.5 Vendor Contract Agreement Overview

The Authoring Documents section is where the Contract Document will be available for vendors. Agencies follow a contract authoring workflow that includes an internal drafting process, an option to share the Authoring Document with the Vendor prior to LAW Department approval (if required) and a mandatory final document review where vendors will review and approve the Authoring Document in PASSPort. This section outlines the steps vendors take to complete this process.

If the agency decides to provide a vendor review prior to LAW approval, the vendor may complete the following steps in PASSPort.

1. Click on the pencil icon to open the Contract document.
2. The Vendor will be able to review the document and make changes to the Authoring Document.

3. After the vendor review is complete, the vendor clicks the Submit button to return the reviewed Authoring Document to the agency,
After the agency has completed the Contract document and the LAW department has provided approval (if required,) the designated Agency Legal Manager will send the contract to the Vendor to review in PASSPort.

The Vendor will receive a notification that the Authoring Document is ready for final review in PASSPort.
Upon clicking the link in the e-mail notification, the Vendor will enter the Documents tab within the Contract section.

1. Vendor will click on the pencil button to review the Authoring Document. In this case, it is a Signature Page.

Note: the vendor will also be able to review the additional Contract Documents that the agency has uploaded in the Contract Documents section.
2. The vendor will review the text of the Signature Page. The Signature Page lists the exact names of all of the documents that are part of the agreement.
Following the vendor’s review, the vendor may take the following actions:

**Save** : Save any changes made in the window.

**Save and Close** : Saves any changes made in the window and take the Vendor back to the Documents Tab.

**Forward** : Allows the task to be forwarded to another Vendor Contact.

**Reject** : Rejects the task back to the Agency.

**Approve** : Approves the task and will allow for the Signature task to be initiated.

**Close** : Will take the Vendor back to the Documents Tab.
3. The Vendor will select the Vendor Contract Signatory from the list of Contract Signatories designated in their vendor record.

4. Click the Approve button.
Once approved, the status will change to Approved in the Authoring Document. The vendor can click the Close button to enter the main contract record.
Within the Documents Tab, the Vendor can now see the Authoring Document status has been updated to Approved.
3.6 Subcontractors Tab

The Subcontractors tab will list any subcontractors added during the RFx submission. It displays basic information on the subcontractor such as the amount of the subcontract, their participation percentage, and the subcontract purpose. This information is carried over from the RFx sections.

Vendors can update the information within PASSPort as part of a Change Request. Examples included adding new Subcontractors or replacing an existing subcontractor. Note: Change requests can only be initiated following Contract Registration.
3.7 LL34 Compliance Tab

The LL34 Compliance tab allows you to complete all Doing Business Data information within PASSPort. Local Law 34 of 2007 (LL 34) is New York City’s campaign finance law that limits municipal campaign contributions from principal officers, owners, and senior managers of entities doing business with the City.

The LL34 Compliance tab in the Contracts module provides information on your organization’s leadership, such as Principal Officers and Owners, which is carried over from the RFx. You are also required to identify a Senior Manager as part of this tab. The LL34 contact titles are necessary for completion of this section in PASSPort.

The LL34 Compliance tab effectively replaces the Doing Business Data Form; this subtab lists Principal Officers and Principal Owners.

Within the Principal Officers tile, you can exclude officers by selecting the checkbox next to the role.

1. To add a contact and assign them a role, click the ellipsis.
Upon clicking the ellipsis, an **Add Contact** window will appear displaying a list of your organization’s users.

2. Select the relevant contact.

3. Click the “Close” button.

If there are no listed owners for your organization or your entity is a non for profit, please select the appropriate response option.

If selecting “Other,” a dialog box will appear, and an explanation needs to be entered.
To identify one or more owners, type their name into the Individual Owners box.

Selecting their name brings the contact into this project as an owner.

To Add an Organization, click the corresponding button.
Within the LL34 Organization Extranet popup, type in the Organization Name.

Click “Save and Close.”

The final section is the Senior Managers tile.

To add in a Senior Manager, type in the contact’s name.

*Note: at least one Senior Manager must be selected.*
4. Completing Organization Signature

This section outlines the process in which Vendor Contract Signatories will use DocuSign to create a signature or initials for completed authoring documents. This includes accessing DocuSign, editing the signature properties, and applying the signature. The steps below highlight this process. Additionally, a short video has been developed to outline the process.

1. Click “Finish.”

The agency will kick-off the E-signature task in PASSPort.

The designated Vendor Contract Signatory selected by your organization at the point of final review will receive an email notification with a link to DocuSign. Here is a sample notification.

1. Click “Review Document.”
2. After reading and agreeing to the disclosure, click the checkbox to confirm “I agree to use electronic records and signatures.”

3. Click “Continue.”
4. Review the document and click “START” to start the signature process.
5. DocuSign will take the Vendor Contract Signatory to the section where the signature will be applied. Click the yellow "SIGN" button.
6. In the popup window, **preview** the signature.

   **Note:** To change a Signature, click into the Full Name and/or Initials fields and overwrite its content.

7. When ready to proceed, click the “**ADOPT AND SIGN**” button.
8. The signature now appears in the document. To complete the signature process, click “FINISH.”
9. DocuSign will display a “You're All Done!” message, indicating that the signature task been completed successfully.

10. Once the document has been signed by all parties, DocuSign will send out a “Completed: Signature Request” email notification. The email will have the document pdf attached and also include a link to “View the Completed Document.”
5. Registration

Your organization will receive an automatic email notification from PASSPort when your contract has been registered. Registration will be confirmed in PASSPort and you will have the ability to take post-registration actions.

Dear {contact_firstname} {contact_lastname},

PASSPort Notification: Contract Registered

Your contract {object_label} has been registered. Click here to view {url}.

If you have subcontracts but have not yet identified the vendor, please do so through the above link.

Regards,

The PASSPort Team
Mayor’s Office of Contract Services (MOCS)

This is an automated message; please do not reply to this email. If you have any questions or need assistance, please reach out to MOCS at help@mocs.nyc.gov.